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## Who We Are

Since 1993, Weinberger Asset Management, Inc. has been an independent, fee-only Private Wealth Management firm. In a complex global economy, we embrace that the financial goals and needs of our clients are as diverse as the clients themselves. Therefore, we deliver innovative investment and planning solutions tailored to each client.

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## Our Process

In an industry obsessed with numbers, we're more interested in you. To us, your life is a story, not a spreadsheet. Which is why we begin with a discovery session that doesn't end until your complete personal and financial picture comes into focus. Through our elegant, proprietary service model we map out your key concerns and address them in a holistic way, mindful of what's best for you and your family. Creating a custom financial framework built on trust and long-term gain is more than smart planning, it's our process.

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## A Fresh Look

Our free, consultative second opinion service puts the focus on you, not your money. Through an extensive discovery plan meeting, we work to discover the values and goals at the heart of your story before building a personally-tailored plan to help bring them to life. If our approach matches your needs, we'll begin the next steps toward a fruitful, long-term partnership. If not, we'll help you find an alternate provider who can. Either way, you'll receive a Total Client Profile and personalized analysis of your situation.

[SCHEDULE A MEETING](#)

[Contact](#)

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